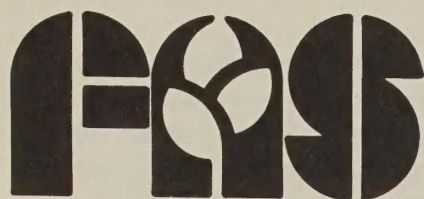


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WEEKLY ROUNDUP OF WORLD PRODUCTION AND TRADE

WR 49-83

WASHINGTON, Dec. 7--The Foreign Agricultural Service of the U.S. Department of Agriculture today reported the following developments in world agriculture and trade:

## GRAIN AND FEED

BRAZIL reportedly has purchased wheat from ARGENTINA totaling just over 400,000 tons for delivery in January and February at prices ranging from \$126 to \$129 per ton, or an estimated \$23 to \$26 per ton less than comparable U.S. wheat. These were the first wheat transactions between Argentina and Brazil since July-June 1981/82 when 300,000 tons were shipped. The president of the Brazilian Wheat Board recently was in Buenos Aires for consultations, indicating the possibility of additional sales. Argentina has been an erratic exporter to Brazil, exporting as much as 1.5 million tons in 1979/80, almost one third of Brazil's total imports. Over the past few years, Brazilian wheat imports have averaged about 4 million tons per year, purchased almost entirely from the United States and Canada.

\*\*\*\*\*

Opportunities for U.S. barley sales are improving as TURKEY's drought-reduced domestic barley supply continues to tighten. The United States recently approved a \$50-million GSM-102 credit guarantee request from Turkey for the purchase of U.S. coarse grains. Sources indicate Turkey will likely buy 400,000 tons of U.S. barley. These purchases, coupled with 190,000 tons of barley bought in September (140,000 tons from the United States and 50,000 tons from Canada), would bring Turkey's 1983/84 (October-September) barley imports to a record 600,000 tons. Shipment of grain purchased under the GSM-102 agreement will likely be January through April, at a rate of 100,000 tons per month. The September purchase was the first Turkish purchase of U.S. barley in nearly 10 years.

\*\*\*\*\*

JAPANESE imports of U.S. pasta products have increased sharply in recent months. Imports for July-September 1983/84 were 205 tons, compared to only 1 ton for the same period last year. The import boost began in July when a Japanese firm arranged to be the sole distributor of pasta products in Japan for a U.S. pasta manufacturer. The Japanese firm intends to import about 100 tons per month currently. However, imports are to be raised to 500 tons per month (almost half of Japan's import needs) in July 1984.

\*\*\*\*\*

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LYNN KRAWCZYK, Editor, Tel. (202) 382-9442. Additional copies may be obtained from FAS Information Services staff, 5918-South, Washington, D.C. 20250. Tel. (202) 447-7937.



CANADIAN grain is breaking shipment records again this season. Total wheat movement in the first few months of the Canadian August-July marketing year is almost 1 million tons ahead of last season's record breaking pace, despite lagging durum shipments. Barley shipments are about 500,000 tons above last season, and rye exports in August-October 1983 already exceed 1982/83 total movement.

\*\*\*\*\*

Since returning to the U.S. grain market in early September the SOVIET UNION has purchased 4.9 million tons of grain for delivery during October 1983-September 1984. The U.S.-USSR agreement provides for minimum Soviet grain purchases of 9 million tons. Purchases to date total around 2 million tons of wheat and 2.9 million of corn. By late November, 1.1 million tons of wheat and 900,000 of corn had been shipped. The bulk of the remaining wheat sales are likely to move by the end of December. Most of the outstanding corn shipments are expected to move in January.

\*\*\*\*\*

Pressure continues in the EUROPEAN COMMUNITY (EC) to dispose of burdensome surplus wheat supplies. Export authorizations of 5.4 million tons as of December 1 are more than 10 percent ahead of last year's pace. Although weekly authorizations have risen to over 300,000 tons, export authorization requests have been nearly a million tons each in the past several weeks.

The EC continues to raise its flour export subsidy, which at the new rate of 87 ECU's per ton (about \$73 per ton) is now 26 percent ahead of the mid-October rate and 78 percent above the September rate. These higher subsidy rates could stimulate additional flour sales as the Community attempts to recapture its past share of the global flour market.

#### OILSEEDS AND PRODUCTS

FRENCH government officials are examining a number of bids for the Comptoir National Technique Agricole (CNTA), France's former leading oilseed crusher that filed for bankruptcy in August. The six CNTA crushing plants have a combined annual crushing capacity of 665,000 tons.

\*\*\*\*\*

After nearly four years of resistance to industry pressure to revise vegetable ghee prices, PAKISTAN's government has finally approved a 25-percent price increase. This action was due to unprecedented increases in international prices of vegetable oils. Because Pakistan relies on imported oil for nearly 75 percent of its edible oil requirements, the higher prices for imported oils were causing an unbearable strain on Pakistan's budget. Despite a more than doubling of world oil prices, Pakistan authorities decided that the entire burden should not be passed through to consumers but should also be shared by the government, hence by price increase of only 25 percent, to Rs. 13.50 from Rs. 10.70.

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Even with the lowered price subsidy, Pakistan's budget deficit due to higher vegetable oil import prices is expected to increase by an additional Rs. 1 billion (\$75.9 million), representing a 4.5-percent increase over the anticipated fiscal year deficit of Rs. 22 billion. The higher domestic prices are not expected to have a significant effect on domestic oil consumption and are considered too small to encourage any substantial increase in domestic oilseed production.

\*\*\*\*\*

With the progressive worsening of the PHILIPPINE balance-of-payments situation and the rapid depletion of international reserves, the government on October 5 devalued its currency for the second time this year. According to an International Monetary Fund assessment, the new exchange rate represents a 21-percent decline from the exchange level resulting from the last devaluation in June. The peso devaluation has led to price increases for a wide range of commodities, especially livestock feed ingredients such as soybean meal. In addition to the 26-percent increase in the price of livestock feed ingredients in late October, another upward price adjustment of an additional 27 to 30 percent is anticipated early next year. With the upturn in feed ingredient prices, the cost of poultry and hog feeds may rise by at least 36 percent. Brazil has been the major soybean meal supplier to the Philippine market in recent years. The U.S. share of the market was 33 percent in 1982.

In a related development, the government raised the ad valorem tax on all imports from 3 percent to 5 percent effective November 3. The added duty is intended to reduce imports to a minimum.

\*\*\*\*\*

JAPAN'S combined imports of oilseeds and meals in terms of soybean meal equivalent (SME) during January-August 1983 totaled 3.6 million tons, up 18 percent from the same eight months last year. Expanded imports of soybeans and meal, at 2.85 million tons meal basis, accounted for the bulk of the gain. The lion's share of Japanese imports have been from the United States.

Japanese imports of soybeans and meal and total oilseeds and meals with historical comparisons are as follows in million tons (SME):

Year	Soybeans & meal		Other oilseeds & meals		Total oilseeds & meals	
	Jan. thru:		Jan. thru:		Jan. thru:	
	Aug.	Dec.	Aug.	Dec.	Aug.	Dec.
1975	1.53	2.67	.45	.70	1.98	3.37
1976	1.93	3.02	.59	.90	2.52	3.92
1977	2.15	3.18	.77	1.08	2.91	4.26
1978	2.57	3.73	.63	.89	3.20	4.61
1979	2.46	3.57	.73	1.04	3.19	4.61
1980	2.47	3.77	.71	1.09	3.18	4.87
1981	2.37	3.55	.64	.96	3.00	4.51
1982	2.42	3.55	.63	.93	3.06	4.48
1983	2.85	1/	.76	1/	3.61	1/

Compiled from unrounded data. 1/ Not available.

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Although this season's expansion in Japanese imports took place during a period when the unit value of Japanese soybean imports rose by more than one-sixth, the average unit value of Japanese soybean imports during January-August 1983 was about 9 percent below that during the same eight months in 1982.

#### DAIRY, LIVESTOCK AND POULTRY

The downturn in URUGUAY's cattle numbers that began in 1981 may be ending, according to the U.S. agricultural attache in Buenos Aires. Beef cow numbers as of Jan. 1, 1984, are forecast to be up 10 percent to 3.3 million head. This expansion in the breeding herd is attributed to recently improved market prices for cattle and expected growth in meat exports. The rebuilding of cattle numbers is expected to result in a 10-percent reduction in cattle slaughter in 1984.

#### COTTON AND FIBERS

CHINA's Ministry of Commerce has announced that as of Dec. 1, 1983, cotton cloth and cotton for wadding are not subject to rationing. The announcement attributes the change to China's steady increase in cotton production, the development of the chemical fiber industry and a large buildup in textile stocks. Cotton goods had been rationed at about 6 meters of cotton cloth and 1.1 pounds of cotton for wadding annually per person.

#### TOBACCO

KOREA's cumulative unmanufactured tobacco exports for January-September 1983 are estimated at 21,164 tons, down 10 percent from the same period in 1982. However, current indications are that total 1983 exports are likely to exceed last year's level slightly, primarily because of increased burley exports. Burley exports for the January-September 1983 period were 13,151 tons, up 12 percent from the same period in 1982. Cumulative flue-cured exports for the same nine months of 1983 are estimated at 8,013 tons, down 33 percent from the same period in 1982. However, flue-cured exports are expected to pick up during the remaining part of the year. The 1983 flue-cured target of 14,000 tons is expected to be attained because of the improved quality of this year's crop and favorable export prices.

\*\*\*\*\*

TAIWAN's 1983 unmanufactured tobacco imports are currently estimated at 11,903 tons, a decline of 26 percent from 1982. Of the total imports, 9,900 tons are estimated from the United States. Other suppliers include South Africa--665 tons, Madagascar--530 tons, South Korea--408 tons, Thailand--250 tons, and Malawi--150 tons. The 1983 decline in tobacco production, combined with the sharp drop in tobacco imports and an expected increase in cigarette production and consumption, should reduce domestic stocks and strengthen the outlook for 1984 tobacco imports. The 1984 tobacco imports are forecast at 17,000 tons. Taiwan also exports small quantities of tobacco leaf. Exports in 1983 are currently estimated at 3,000 tons, down 32 percent from 1982.

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SAUDI ARABIA recently revised its regulations governing permissible levels of tar and nicotine. Under the new standards, imported cigarettes will be required to have less than 15 milligrams of tar and 1 milligram of nicotine. Cigarettes that exceed this limit will be rejected. The testing of sample lots by customs officials reportedly began December 1.

\*\*\*\*\*

INDIA's 1983 cigarette production is currently estimated to equal last year's record level of 93 billion pieces. Following a 3.1-percent increase during January-April 1983, cigarette production leveled off in subsequent months to the levels prevailing in 1982. A decline in sales caused by price increases and subsequent sluggish demand is attributed to a recent slowdown in cigarette production.

\*\*\*\*\*

PHILIPPINE exports of unmanufactured tobacco in 1983 are expected to be up 8 percent to 29,000 tons as exporters strive to maximize peso returns associated with the recent peso devaluation. Exports of flue-cured tobacco in 1983 are estimated to show a 4-percent improvement over 1982 exports of 14,400 tons. Exports of native tobacco in 1983 are likely to reach 12,000 tons, up 10 percent from the 10,931 tons exported in 1982. Burley tobacco exports in 1983 are expected to improve 30 percent to 1,760 tons. The price incentive associated with the recent devaluation is the major factor in stimulating exports.

In contrast to the uptrend in leaf exports, imports of unmanufactured tobacco in 1983 are expected to fall. Imports are currently forecast at 6,200 tons in 1983, compared to 9,218 tons in 1982. Imports are estimated to be down due to higher import prices as a result of the peso devaluation and continuing import tightening measures to minimize foreign exchange outflows.

#### FRUITS AND NUTS

The 1983 commercial orange crop in the BRAZILIAN State of Sao Paulo is forecast by the U.S. agricultural officer in Rio de Janeiro at 7.344 million tons (180 million 40.8-kilogram boxes), down 8 percent from last year's harvest. Initial forecasts have been reduced because of recent above-normal rains. The harvest of early season fruit is complete and the harvest of Valencias and Natalis is now in full swing. The orange harvest is well ahead of last year's delayed crop and is expected to be complete by January.

\*\*\*\*\*

ISRAEL's 1983/84 citrus crop is now forecast 1.36 million tons, down 6 percent from last season and down 25 percent from the 1.8-million-ton bumper crop of 1981/82. Production of every major fruit type, except lemons, is expected to be down in 1983/84.

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Orange production is forecast at 820,000 tons, down 6 percent, and grapefruit production at 400,000 tons, down 8 percent. Lemon production is forecast at 60,000 tons, up 15 percent. The weather this season has been characterized by near-optimal moisture conditions, which lead to an excellent, although somewhat late, flowering and fruit-set. Citrus area, however, is down sharply. Despite the overall production decline, the general outlook for 1983/84 exports is promising because of improved fruit quality and the devaluation of the shekel.

In 1982/83, stormy, wet weather caused fruit quality problems, especially for grapefruit and Shamouti oranges. In addition, an overvalued shekel trimmed important export opportunities and hence producer returns. As a result of the discouraging situation, citrus area declined as groves were uprooted but not replanted.

## WORLD FOOD PRICES

### World Food Price Comparison Table

FAS Survey of Average Retail Food Prices in Selected World Capitals, November 4, 1983  
(in U.S. dollars per kg 1/or units as indicated, converted at current exchange rates)

Item	Bern	Bonn	Brasilia	Buenos Aires	Canberra	London	Madrid	Mexico City
Steak, sirloin, boneless..	21.14	9.40	2.79	2.29	7.28	11.82	6.41	2.41
Roast, pork, boneless.....	11.57	4.88	3.17	2.29	4.39	4.02	4.89	3.23
Broilers, whole.....	2.87	1.68	1.31	1.03	3.35	2.46	1.95	1.40
Eggs, large,dozen.....	2.45	0.96	0.62	0.53	1.54	1.30	0.92	0.52
Butter.....	7.92	3.87	2.08	2.57	3.27	2.84	5.69	2.92
Cheese,Cheddar,Emmenthaler	8.46	5.60	3.68	3.47	4.66	3.59	6.51	5.71
Milk, whole, liter.....	0.72	0.43	0.23	0.32	0.61	0.49	0.37	0.23
Oil, cooking, liter.....	2.29	0.94	1.08	1.45	2.16	1.15	1.09	0.78
Potatoes.....	0.49	0.34	0.50	0.43	0.72	0.55	0.20	0.39
Apples.....	1.19	0.88	1.27	0.35	1.57	1.03	0.46	0.98
Oranges.....	1.38	1.06	0.14	0.28	0.82	1.07	0.65	0.14
Flour.....	0.84	0.56	0.29	0.29	0.73	0.34	0.46	0.14
Rice.....	1.54	1.11	0.52	0.74	0.88	1.01	0.78	N/A
Sugar.....	0.72	0.74	0.37	0.41	0.61	0.77	0.60	0.19
Coffee.....	8.22	6.77	2.09	5.09	10.69	6.98	5.66	1.22

1/ 1 kilogram = 2.2046 pounds; 1 liter = 1.0567 quarts. Bonn: Steak, sirloin is bone-in.



Item	Ottawa	Paris	Pre- toria	Rome	Seoul	Stock- holm	Wash. Tokyo D.C.
Steak, sirloin, boneless..	6.69	7.89	6.40	N/A	10.89	13.82	31.20 6.48
Roast, pork, boneless.....	2.85	5.59	4.61	6.38	3.55	12.81	6.99 6.15
Broilers, whole.....	2.45	2.86	1.67	3.22	3.06	3.44	3.36 1.52
Eggs, large.dozen.....	0.89	1.14	0.83	1.14	1.17	1.60	1.06 1.60
Butter.....	4.24	3.73	3.15	3.84	4.95	3.52	6.22 4.60
Cheese,Cheddar,Emmenthaler	7.22	3.86	3.94	6.32	N/A	5.68	5.17 6.15
Milk, whole, liter.....	0.77	0.48	0.53	0.56	0.89	0.47	0.86 0.47
Oil, cooking, liter.....	1.88	1.60	1.84	1.05	1.53	4.41	1.21 2.08
Potatoes.....	0.30	0.17	0.62	0.37	.46	0.50	0.96 0.41
Apples.....	1.23	1.86	1.21	0.62	.85	1.22	1.64 0.87
Oranges.....	0.90	1.07	0.55	0.62	1.02	1.31	2.75 1.03
Flour.....	0.93	1.38	0.63	0.36	0.29	0.66	0.82 0.46
Rice.....	1.18	0.68	0.93	1.18	1.10	1.64	1.46 0.94
Sugar.....	0.41	0.68	0.54	0.76	1.05	0.84	1.16 0.99
Coffee.....	6.95	5.61	6.32	6.81	14.91	6.33	13.81 6.26

1/1 kilogram = 2.2046 pounds; 1 liter = 1.0567 quarts Ottawa: Steak, sirloin, and roast pork are bone-in.

Selected International Prices

Item	:	Dec. 6, 1983	:	Change from	:	A year
	:		:	previous week	:	ago
ROTTERDAM PRICES 1/		\$ per MT	\$ per bu.	\$ per MT		\$ per MT
Wheat:						
Canadian No. 1 CWRS-13.5%.		195.00	5.31	-4.00		202.00
U.S. No. 2 DNS/NS: 14%...		182.50	4.97	-2.50		181.50
U.S. No. 2 S.R.W.11/.....		158.50	4.31	+2.50		156.00
U.S. No. 3 H.A.D.12/.....		198.00	5.39	0		182.00
Canadian No. 1 A: Durum..		208.00	5.66	-3.00		202.00
Feed grains:						
U.S. No. 3 Yellow Corn....		155.00	3.94	-4.00		118.00
Soybeans and meal:						
U.S. No. 2 Yellow.....		301.00	8.19	-9.00		233.25
Brazil 47/48% SoyaPellets 2/		278.00	--	-3.00		228.50
U.S. 44% Soybean Meal.....		252.50	--	-4.50		216.50
U.S. FARM PRICES 3/						
Wheat.....		127.13	--	+0.08		N.A.
Barley.....		82.21	--	+0.02		N.A.
Corn.....		124.40	--	+0.05		N.A.
Sorghum.....		110.23	-- 4/	+0.20		92.37
Broilers 5/.....		1235.70	--	-94.10		N.A.
EC IMPORT LEVIES						
Wheat 6/.....		72.40	1.97	+1.10		105.35
Barley.....		49.25	-1.07	+2.30		102.15
Corn.....		45.85	1.16	+0.65		104.75
Sorghum.....		58.15	1.48	-1.80		96.30
Broilers 7/.....		N.Q.	--	-- 8/		--
EC INTERVENTION PRICES 10/						
Common wheat(feed quality)		165.80	4.51	-1.30		180.60
Bread wheat (min. quality)		181.70	4.95	-1.40		199.20
Barley and all						
other feed grains.....		165.80	--	-1.30		180.60
Broilers 9/.....		N.Q.	--	--		--
EC EXPORT RESTITUTIONS (subsidies)						
Wheat 10/.....		41.40	1.13	0		69.55
Barley.....		28.35	.62	--		72.10
Broilers 7/.....		N.Q.	--	-- 10/		--

1/ Asking prices in U.S. dollars for imported grain and soybeans, c.i.f., Rotterdam. 2/ Optional delivery: Argentine. 3/ Based on selected major markets and adjusted to reflect farm prices more closely. 4/ Hundredweight (CWT). 5/ Twelve-city average, wholesale weighted average. 6/ Durum has a special levy. 7/ EC category--70 percent whole chicken. 8/ Reflects lower EC export subsidy--down to 20.00 ECU/100 bag effective 14 Sept 83 from 22.50 ECU/100 bag set in Feb 1983. 9/ F.o.b. price for R.T.C. broilers at West German border. 10/ Corrective amount in ECU's: Dec. zero, Jan. -3, Feb. -5, Mar. -6. 11/ January shipment. 12/ April/May shipment. N.Q.=Not quoted. N.A.=None authorized. Note: Basis December delivery.



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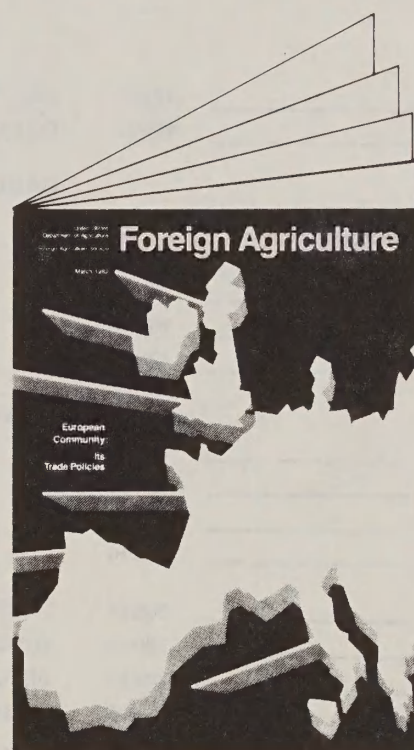
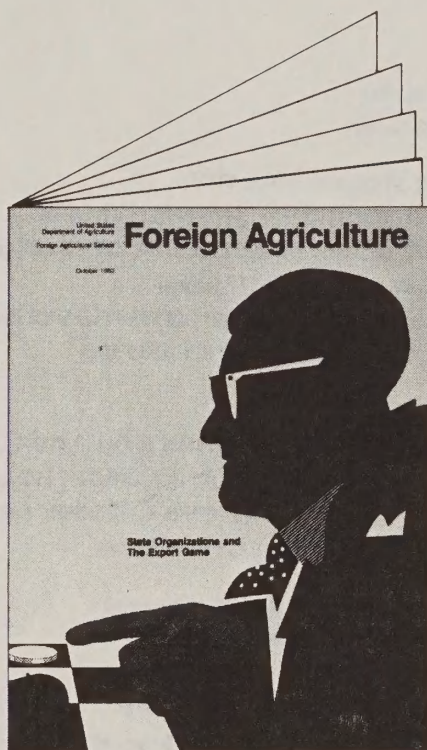
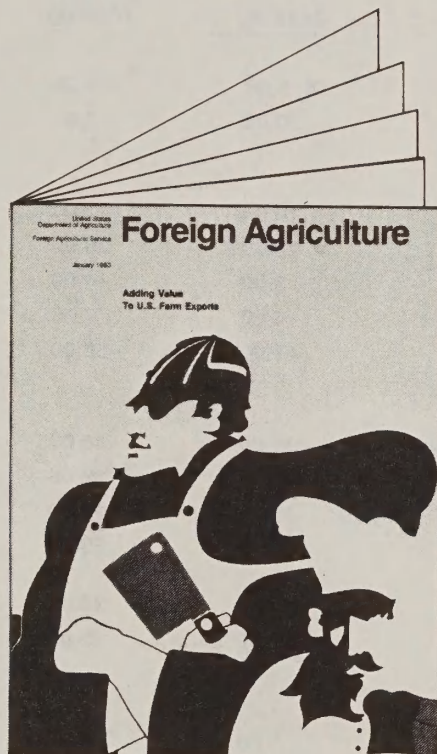
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